

## **POLICY AND PROCEDURES FOR ORGANISING TRIPS AND VISITS**

This document has been produced by members of Wells u3a and approved by the Trustees and Group Leaders.

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# WELLS u3a POLICY AND PROCEDURES FOR ORGANISING TRIPS AND VISITS

Visits and residential trips, within the UK and abroad, are an important aspect of Wells u3a but safety is paramount and therefore careful planning and organisation are essential to ensure maximum benefit and minimum risk.

## A. ORGANISATION AND ARRANGEMENTS

### 1. General Planning

- 1.1 Decide on destination, preferred date, and duration of the trip/visit.
- 1.2 Check with the committee that there are no clashing dates or objections before any definite plans are made. Agree who the Emergency Contact will be.
- 1.3 To plan the trip you may find the Visits Check List useful (section C, page 6) adding any additional items as necessary.
- 1.4 Calculate the journey time - ask the coach company for advice. From this you can deduce the departure and return times. For car journeys calculate the distance and journey time using the internet. Allow time for comfort stops.
- 1.5 Calculate the cost. (*see note 5*)
- 1.6 Publicise the trip in Wells u3a Newsletter. Include a description, the time, date, venue, price and any special access issues. At the end of the Newsletter your application form should ask for the following information:
  - a cheque made payable to Wells u3a Main or bank transfer (BAC) which will need the u3a bank a/c sort code, a/c number and a reference name (check these details with the Treasurer). Ask the applicant to let you know if they intend to pay by bank transfer.
  - the applicant's name, landline, mobile number and membership number.
  - any other information you think relevant, such as dietary requirements and menu choices where meals have been arranged. When enough applications have been received the organiser should put the names onto a Beacon list (supplied by the Beacon adviser) which will enable the printing of a spreadsheet with all the categories and details needed for the trip including mobile phone numbers and emergency contact details. The organiser can then print off 3 copies, one for themselves, one for the deputy and one for the Emergency Contact. Beacon training can be provided by the Beacon Adviser.
- 1.7 In some circumstances it may be necessary to add a closing date for applications. Having a waiting list of applicants allows for replacements for those who drop out at the last minute.

### 2. Responsibilities of the Organiser

- 2.1 To ensure that adequate arrangements are planned and implemented for the safety and welfare of all participants.
- 2.2 To enlist a deputy to help generally and assist in case of an emergency.
- 2.3 To brief the deputy fully about their role and responsibilities.
- 2.4 To brief participants prior to the trip.
- 2.4 To provide whatever information is needed to the venue.
- 2.5 To provide copies of all participants details to the Emergency Contact and the deputy.

### 3. Health and Safety

- 3.1 All trips and visits must have an organiser and deputy.
- 3.2 Risk Assessment - It is the responsibility of the organiser to identify potential hazards, e.g. rough ground, worn steps, etc. Issue warnings beforehand and seek to minimise these risks which should be included in the trip details sent to participants.

## **4. Transport**

- 4.1 Hired coaches - coaches should be hired from reputable operators. It is desirable to get 2 or 3 quotes.
- 4.2 Private cars - It is believed that there is no problem with passengers contributing to the costs of travel. Currently the cost per mile is 45p and this should be borne in mind when asking for a donation, divided between everyone in the car.

## **5. Finance**

- 5.1 The organiser should ensure that the trip is cost neutral to Wells U3A.
  - Work out a budget: calculate the total cost assuming only 90% of coach capacity.
  - Include extra for gratuities to coach driver and hotel staff.
  - All information about the trip should clearly state what is, and is not, included.
  - Check with the coach company (and any other organisations) whether they need payment in advance with a request for an invoice to be sent to our Treasurer. If an invoice is not forthcoming a receipt will be needed.
  - Calculate the minimum number required for the trip to be viable.
  - Send a general email to all members with a request for more participants if you fall short (or cancel the trip if there are not enough participants and inform those who have applied).
  - Discuss with the Treasurer the refund policy for any participants who cancel.
- 5.2 The organiser should ensure that all cheques for trips of less than 24 hours are made payable to Wells U3A Main. Cash should not be accepted.
- 5.3 For trips over 24 hours a bonded travel agent should be used to organise the trip, and all payments should be made directly to the agent.
- 5.4 Cancellation - participants should be informed of the details regarding the forfeiture of any money paid.
- 5.5 Payment - well before the date of departure check that all participants have paid the correct amount. Cheques must be correctly completed; the bank will not accept any alterations. The Treasurer can confirm that participants have paid by BACs if the organiser supplies a list.

## **6 Insurance**

The Third Age Trust (TAT) holds public and products liability insurance that only covers accidents either caused by, or happening to, members of U3A when involved in U3A activities. It is not travel or medical insurance covering individual members and this should be made clear to all participants of any trip or visit. Everyone is responsible for their own travel and medical insurance.

For travel within the UK, travel insurance may be obligatory, depending on the agent's policy. Assurance has been given by head office that overnight trips within the UK are covered by HQ insurance. However this would not cover any monies paid in the event of the collapse of the coach company, hotel or venues.

*(a copy of the TAT insurance policy is available on our website)*

For travel outside the UK mainland travel insurance is mandatory and details must accompany bookings or be taken out through the travel agent..

## **7 Communications/Documentation**

- 7.1 After initial publication in the Wells u3a newsletter, further information and itinerary should be sent to participants using Beacon. However a few members do not have computers (this information appears on Beacon) so these members will need to be contacted by post or phone.
- 7.2 Advise participants that the organiser may have to cancel or change the itinerary due to unforeseeable circumstances and refunds may not be paid in full. If you are using a travel agent, check the terms and conditions and what has been included/excluded.

- 7.3 Participants may either send their application form through the post or by email - a deadline should be set for this.
- 7.4 An explanatory meeting might be needed for all participants if the organiser feels that this is appropriate.
- 7.5 Remind participants of the trip if there has been a long gap between application and the date of the trip.
- 7.6 Remind your coach company of passenger numbers and time of departure. Ask the coach company to be at the departure point ¼ hr before departure time. (If you need further help and advice ask the Trips sub-committee for contact details of members who have previously organised trips).
- 7.7 When planning a complex trip it may be advisable to circulate an "Expression of Interest" form that does not carry any obligation to take part. When it becomes apparent that a trip has enough participants, an application form and confirmation must then be circulated.
- 7.8 Where there are other details needed, e.g. menu choices, it may be necessary to circulate a request around all participants.
- 7.9 The venue should be made aware if any participants have disabilities e.g. the need for walking aids etc.

## **8 On the Day**

- 8.1. Check people on to the coach from your checklist, make sure your deputy and the Wells u3a Emergency Contact have a copy of this information.
- 8.2. Sometimes coach drivers have not looked at a map beforehand or may not be familiar with the venue. It is advisable to have a map with you. Ask the driver for his mobile phone number, in case you need to contact him, and give him yours. He may have to park the coach elsewhere during the visit.
- 8.3. Charge up your mobile phone ready to take with you. If passengers are late for departure phone them.
- 8.4. Take your copy of the trip and passenger details, any tickets needed and menu choices, if appropriate.
- 8.5. Welcome people on board, give brief details of itinerary (coffee stops, etc) and include departure time and approx. return time. Make it known that the coach will leave promptly!
- 8.6. At each stop check numbers of passengers. See people onto and off the coach so that everyone has the chance to ask you any questions or point out any problems. Ensure that everyone knows what time they need to be back on the coach.
- 8.7. Don't forget to thank the driver at the end of the day and to present him with his gratuity. As a guideline, a gratuity is based on £1 per person, per day for the coach driver and a further £1 per person, per day for any hotels used during holidays.

## **B EMERGENCY PROCEDURES**

### **1. Organiser's Responsibilities**

- 1.1. The Trip organiser would usually take charge in an emergency. They would need to ensure that emergency procedures are in place and that back up cover is arranged. They should liaise with the representative of the tour operator if one is being used.
- 1.2. The organiser would communicate with the designated Emergency Contact in Wells u3a whose main responsibility is to link the group with the families/friends emergency named contacts. They should have all the necessary information about the visit provided beforehand.

### **2. What to do in an Emergency**

If an emergency occurs the following points need to be considered by the organiser:

- 2.1. Establish the nature and extent of the emergency as quickly as possible without endangering anyone else.
- 2.2. Summon the emergency services, if needed.

- 2.3. Establish the names of any casualties and get immediate medical attention as necessary. Witnesses' names and contact details may be needed.
- 2.4. Ensure that the entire group is safe and looked after.
- 2.5. Ensure that the deputy organiser accompanies casualties to hospital and that the rest of the group is adequately always supervised and kept together.
- 2.6. Notify the police if necessary.
- 2.7. Notify the British Embassy/Consulate if an emergency happens abroad.
- 2.8. Inform the Wells u3a Emergency Contact - their telephone number should be always accessible during the visit.
- 2.9. Details of the incident that need to be passed on to the Wells u3a committee contact should include:
  - nature, date and time of incident.
  - names of casualties and details of their injuries.
  - names of others involved so that families/friends can be reassured.
  - action taken so far; action yet to be taken (and by whom).
- 2.10. Notify insurers as soon as possible, especially if medical assistance is required (the committee contact can be used to do this).
- 2.11. Notify the tour operator (if there is no tour operator representative travelling with the party - the Wells u3a Emergency Contact can be used to do this).
- 2.12. Ascertain telephone numbers for future calls and put on your mobile phone. Bear in mind that mobile phones may be subject to loss of signal in some areas. Make sure yours is fully charged.
- 2.13. Write down accurately, and as soon as possible, all relevant facts and witness details and preserve any vital evidence including taking record photographs. Keep a written account of all events, times and contacts after the incident, using the Wells u3a report form (*available on the website*)
- 2.14. No-one in the group should speak to the media. Names of those involved should not be given to the media as this could cause distress to families. Media enquiries should be referred to a designated media contact in the home area.
- 2.15. No-one in the group should discuss legal liability with other parties.

### **3 Procedures for the Wells u3a Emergency Contact**

- 3.1. Prior to the visit, the name and home/mobile telephone numbers of the Wells u3a Emergency Contact should be identified. It is advisable to arrange a second contact as a reserve.
- 3.2. The organiser should bear in mind that the contact line may become busy in the event of an incident and that alternative numbers to ring would be useful.
- 3.3. If an emergency occurs the main considerations for the Wells u3a Emergency Contact to consider include:
  - ensuring the organiser is in control of the emergency and establishing if any assistance is required from the Wells u3a Committee.
  - contacting the Wells u3a Chairman and liaising with him/her. If the Chairman is on the trip another committee member should be nominated to act on their behalf.
  - it is a priority that the Wells u3a Chairman or Wells u3a Emergency Contact should speak personally to the families/friends of all participants, whether they have suffered injury or not.
  - families/friends contact numbers need to be available at all times whilst the group is on the visit. The Wells u3a Emergency Contact should act as a link between the group and families/ friends and they should be kept as well informed as possible at all stages of an emergency. Contact must be established even though news may have already broken in the media.
  - the Wells u3a Emergency Contact should act as a link between the group and the Chairman and arrange for the group to receive assistance if necessary.
  - a full record of the incident must be kept.

- if a serious incident occurs, the Wells u3a Emergency Contact should liaise with a designated Wells u3a Media Contact as soon as possible. In the event of an emergency all media enquiries should be referred to this Media Contact. The name or names of any casualties should not be given to the media.

#### **4. After a serious incident has occurred**

- 4.1. It is not always possible to assess whether group members not injured or directly involved in the incident have been traumatised. In some cases reactions do not come to light immediately. Group members in this situation may need to seek professional advice later.
- 4.2. The organiser and the Emergency Contact must send a full report of any accident of serious incident to Wells u3a Chairman or Committee for inclusion in the Accident Report Book.

#### **C. GENERAL CHECK LIST**

1. Have you decided possible destination, obtain preliminary details & chosen possible date(s) and got clearance from Wells u3a Committee?
2. Has the u3a Emergency Contact been nominated?
3. Have you checked with venue owner or Tour Operator about possible hazard?
4. Have you obtained quotes from 2 or 3 reputable coach companies?
5. Have you publicised the trip and circulated an application form?
6. Once you have enough have you confirmed the booking in writing with your passengers, venues and coach companies?
7. Have you received all the cheques and submitted them to the Treasurer?
8. Have you completed a list of passengers with all details for your use onto Beacon with a copy for your deputy and committee?
9. Have you the telephone number of your 'home' emergency contact person (see the notes of Emergency Procedures)?
10. Have you checked with the Treasurer that everyone has paid?

**This Policy and Procedures were adopted by the Wells u3a Trustees (committee) on 3 June 2024.**